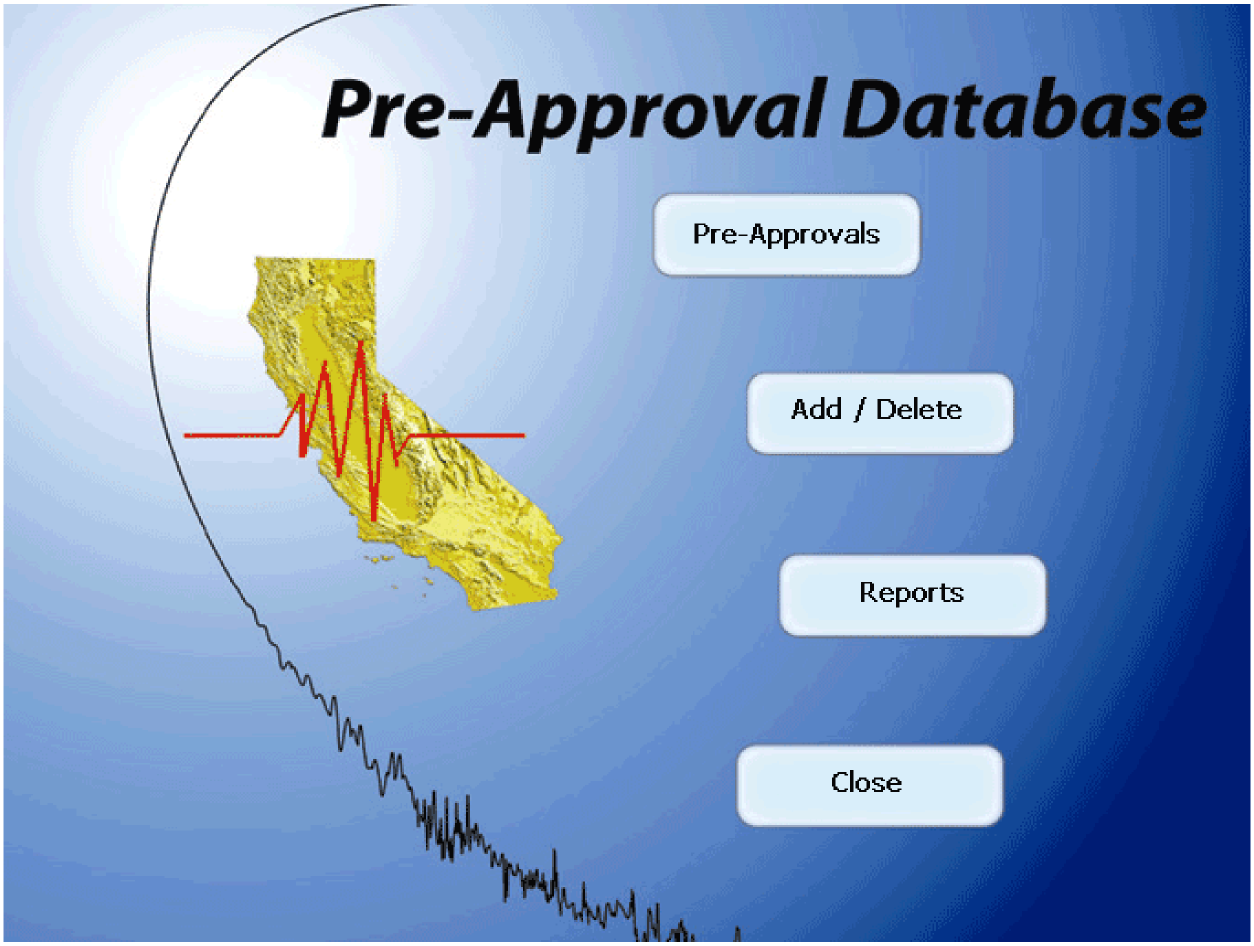

User Manual

Updated: 7/16/04 1:39:00 PM

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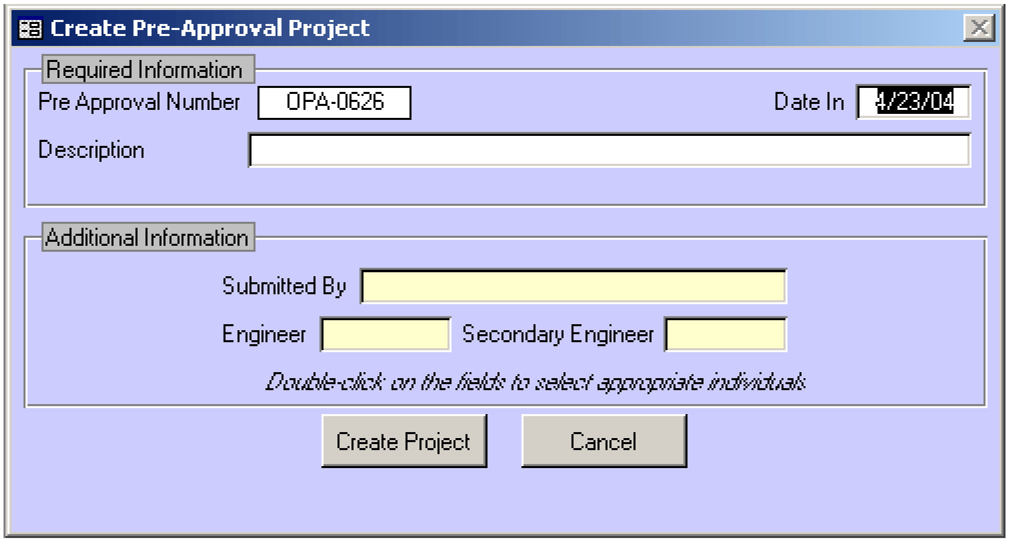
Adding a Pre-Approval Project

Begin by Clicking on the Add half of the Add/Delete button on the main form.

You should now see the following form:



At a minimum, you must enter a Description and Date In to create a new Pre-Approval project. The Submitted By, Engineer and Secondary Engineer are all additional information that can be added at the time you create the project.

Once you have the minimum information entered and click Create Project, the Pre-Approval project is created and a default Review and Account Log record are added to the project. The program then prints an acknowledgement letter for your new pre-approval project.

Field Descriptions and Features

Pre Approval Number: This number is generated by finding the highest pre-approval number in the database and incrementing it by one. This number is read-only.

Date In: This number defaults to today's date when the form is opened. You can change it to any date you wish.

Description: This field contains a text description of the equipment. The description has a limit of 55 characters.

Submitted By: This field displays the firm name of the submitting firm once one has been selected. (See Adding Additional Information)

Engineer: This field displays the license number for the engineer once one has been selected. (See Adding Additional Information)

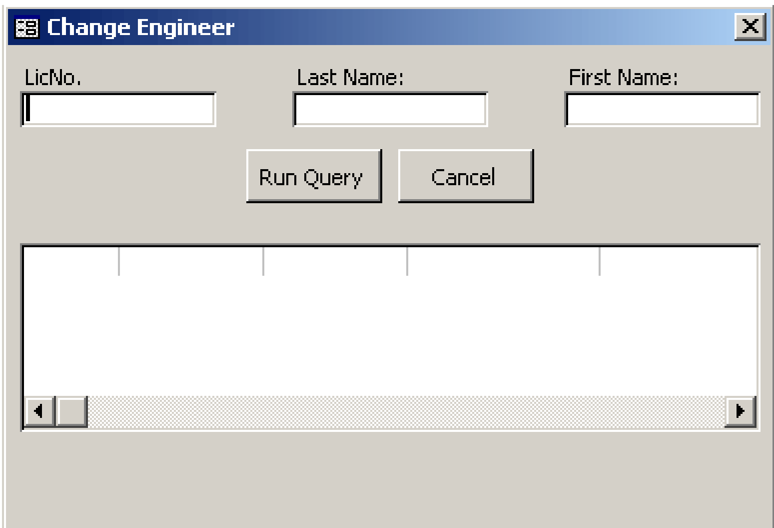
Secondary Engineer: This field displays the license number for the secondary engineer once one has been selected. (See Adding Additional Information)

Create Project Button: This button adds the pre-approval project to the tables and also adds default records for the review and account screen. Once the project has been added to the tables, an acknowledgement letter is printed in MS Word.

Cancel Button: Cancels creation of a new project and closes the form.

Adding Additional Information

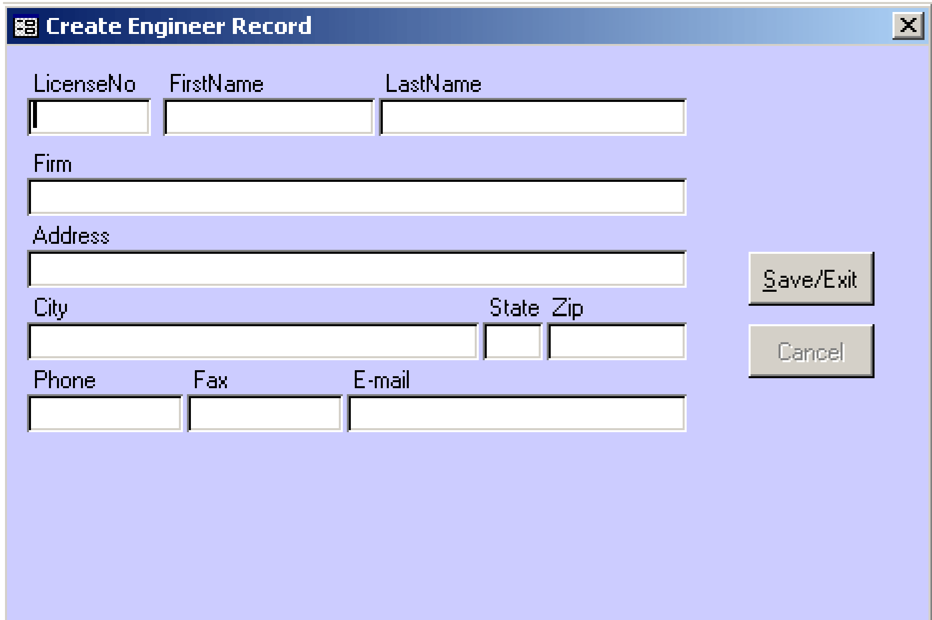
To add information to any of the fields in the additional information section, double click on the



yellow portion of the field. This will bring you up a query box like the one shown below:

You can enter information in as many or as few fields as you'd like. The more information you give it, the more refined your search results will be. If you leave all the fields blank, you will get returned all of the records available. To attach a record to your project, simply double-click the record. This will add the individual or firm to your project and close this form.

In order to add a new record, you must first have a search that fails. To force a search to fail, you can enter "zzz" in the LicNo. Field and click run query. Once a search has failed, you will see an add button at the bottom of the form. Click this button to add a record. You will then see a form similar to the Create Engineer form below:



Fill in as much information as you have, click the Save/Exit button to save the record in the database.

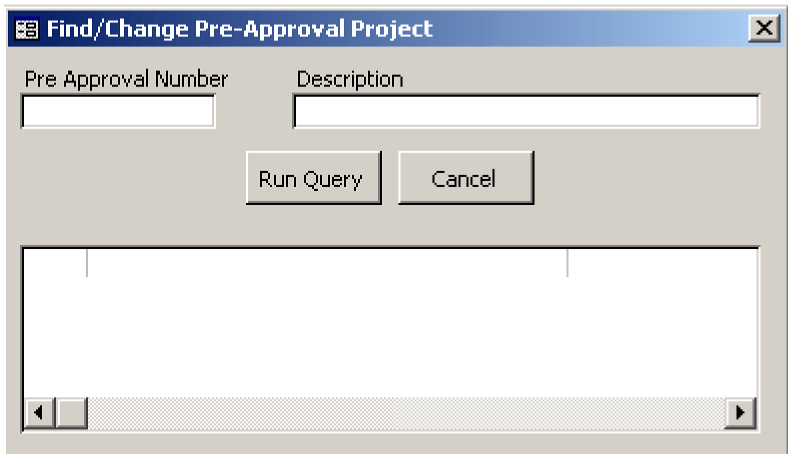
* The LicenseNo field will only accept the following formats: one letter followed by five numbers (i.e. C12345), or two letters followed by four numbers (i.e. SE1234).

After you click the Save/Exit button, the record you just entered will be loaded on the Change… form. You can now double-click your newly added record to attach it to your new project.

Using the Pre-Approval Form

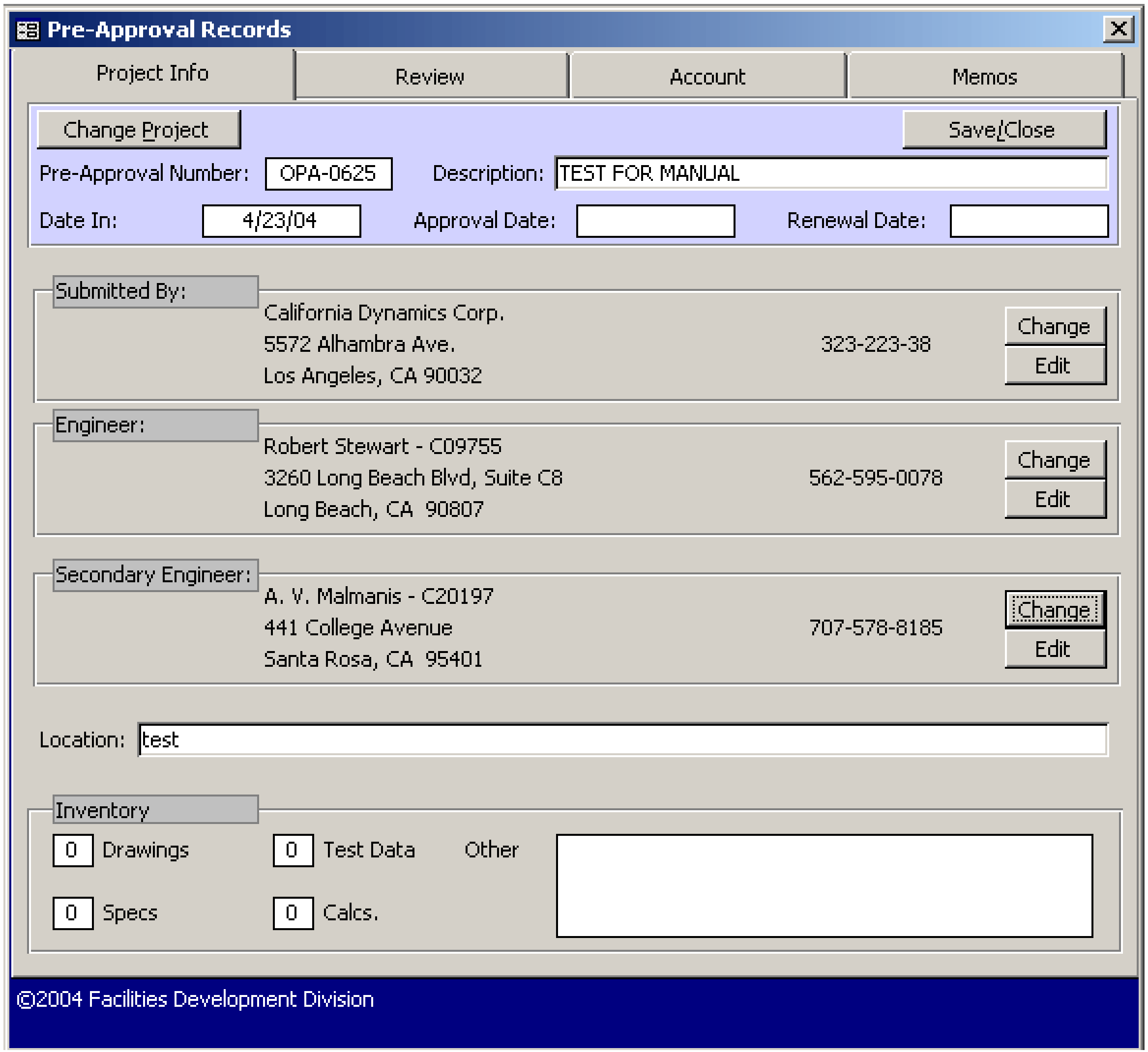
Opening a Pre-Approval Record

Begin by clicking on the Pre-Approvals button on the main form. You will receive a form to search for a pre-approval project (See below).



Again, you can enter as much or as little information as you would like. More information results in a more refined search. If you leave the fields blank, you are returned all of the available records. Click the run query button to find projects. Once the list is filled with records, you may then select one by double-clicking on it. This will then load the pre-approval project form with your selected project with the project info tab selected (See below).

Proj Info tab



Field Descriptions and Features

Change Project: Click this button to select another pre-approval project.

Save/Close: Click this button to save the current project and close the form.

Pre-Approval Number: Read-only field that displays the current pre-approval project number.

Description: Contains the description for pre-approval equipment.

Date In: Read-only field that displays the date the project was entered into the system.

Approval Date: The current date of approval for the pre-approval project.

Renewal Date: The date the current approval date expires.

* The above fields and buttons remain constant throughout all four tabs of the form, thus will not be mentioned again.

Submitted By group: This group contains the firm name and address of the submitter. This group also includes a change button and edit button for modifying the submitter's information.

Engineer group: Same as Submitted by Group but, instead of the a firm name, the Engineer's name is shown.

Secondary Engineer group: Same as Engineer group.

Location: Specifies the physical location of the pre-approval package documents. This is to help reviewers track down plans within the office when a review is needed.

Inventory group: This group contains read-only fields that sum the inventory information from all reviews.

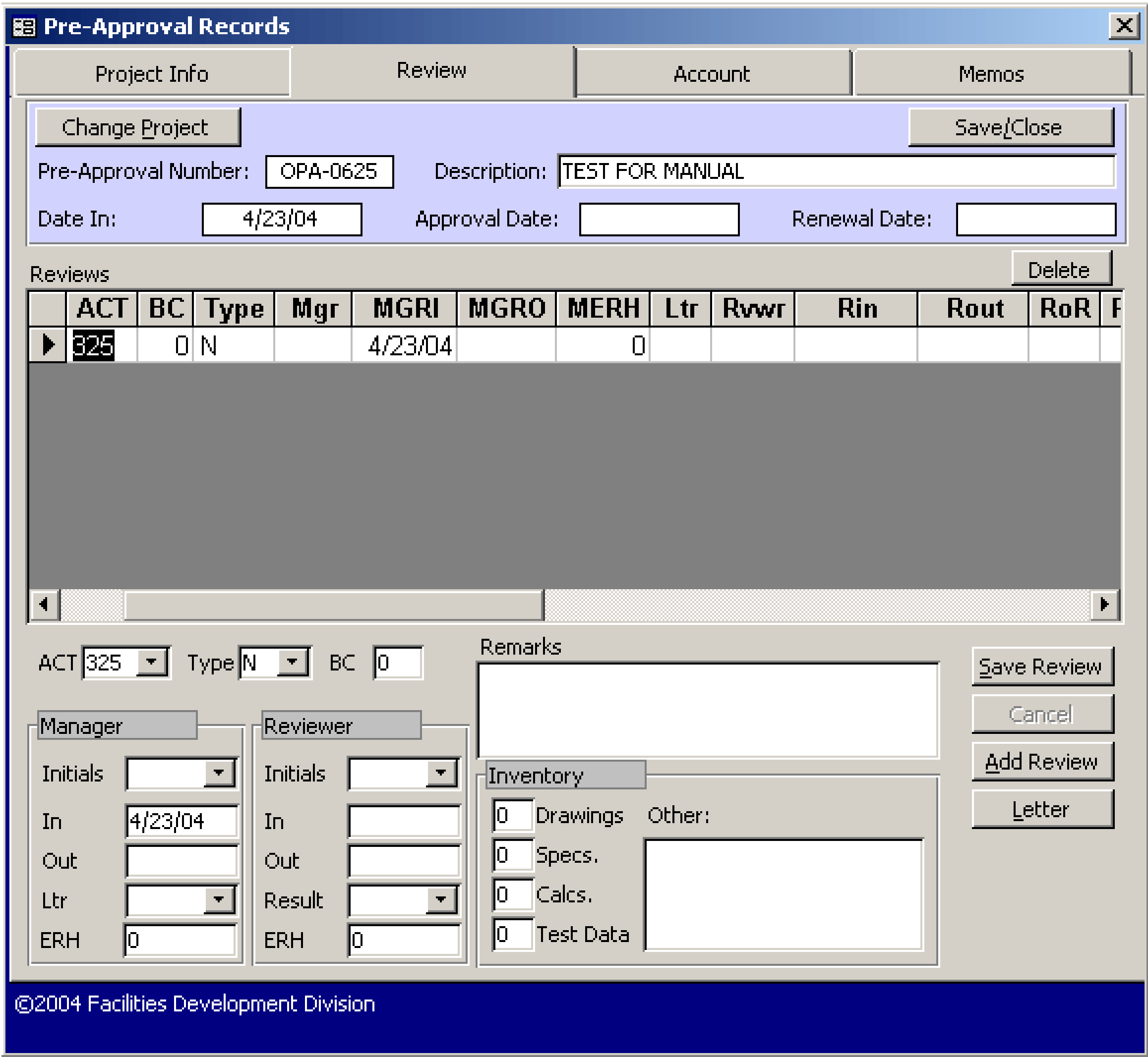
Changing Submitted By and Engineer Information

To select a different assignee for any group, click the change button within that group. You will then see the same Change… form that you used during the create a project process. For details on the use of this form, see "Adding Additional Information" from the Adding a Pre-Approval Project section.

To edit an assignee's information, click the edit button within that group. This will bring up the same Create… form that you may have seen during the Adding a Pre-Approval Project process. The difference this time is that the form is opened with the assignee's information loaded so that you can make changes to it. Once you have made your changes, click Save/Exit on the form. This will return you to the pre-approval form with the updated information displayed.

* When you edit an assignee's information, the assignee's permanent record is updated and the change will be applicable to all projects that the assignee is assigned to.

Review tab



Field Descriptions and Features

Reviews section: This area is a read-only table view of all of the review records associated with the project.

Delete button: This button will delete the selected review.

ACT: The activity code for the review.

Type: The type of review; either N for New or R for Renewal.

BC: The backcheck number of the review, if applicable.

Remarks: Available to store any remarks about the review.

Manager Group: Contains the initials of the person responsible for the review and their review information.

Reviewer group: Contains the initials of the reviewer and their review information.

Inventory group: Contains information about how many items of a particular type were received for this review. The other section is available for any non-standard items received.

Save Review button: Clicking this button will save the review and update the information in the Review section above. Clicking this button will also evaluate if the Approval date and Renewal date fields need to be set or cleared. It will also warn you of any unpaid fees prior to approving a review.

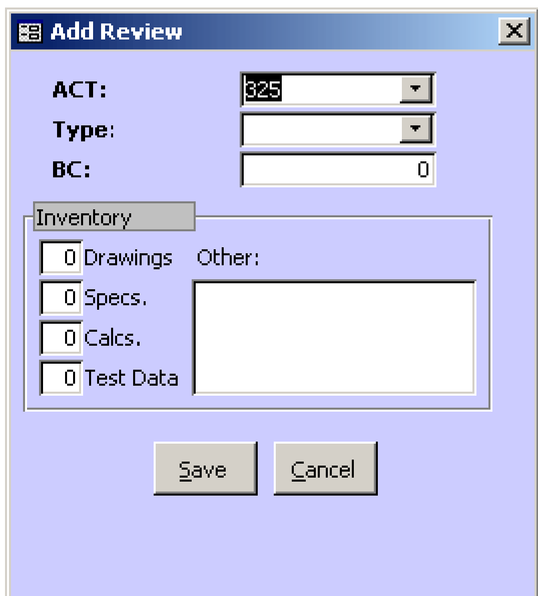
Cancel button: Cancels any changes you have made since your last save.

Add Review button: Allows you to add a new review. This will be covered later.

Letter button: Prints the appropriate letter, if applicable, for the selected review.

Adding a Review

Click on the Add Review button on the Review tab of the pre-approval form. You will then see the form below:



An activity code and type are required to create a review. You can also enter a backcheck number and update the inventory of items received at this time. When you have finished adding information, click the Save button. This will return you to the Review tab with the review you just entered selected.

Editing a Review

To edit a review's details, begin by selecting the review on the Review tab of the pre-approval form in the Reviews section.

You can now change any information you would like. Once you have finished making your changes, click the Save button.

Setting Approval Date and Renewal Date

The Renewal Date is automatically set to the Approval date plus three years.

To set the Approval Date, you must select a manager ltr type of AP or AC, then save the review. You will then be asked if you would like to set the Approval date for this project. If you choose no, the approval date will not be set, but the review will still be saved as approved. If you choose yes, the Account log will be checked to ensure all fees that have been invoiced, have been received. If there are outstanding fees due, you are asked if you would like to continue to approve the project. If there are no outstanding fees due, you will finally be asked to set the code year for the CBC that the equipment was reviewed to. Then the approval and renewal dates will be set.

Removing Approval Date and Renewal Date

To remove the Approval date and Renewal date, simply save a review without AP or AC as the manager ltr type.

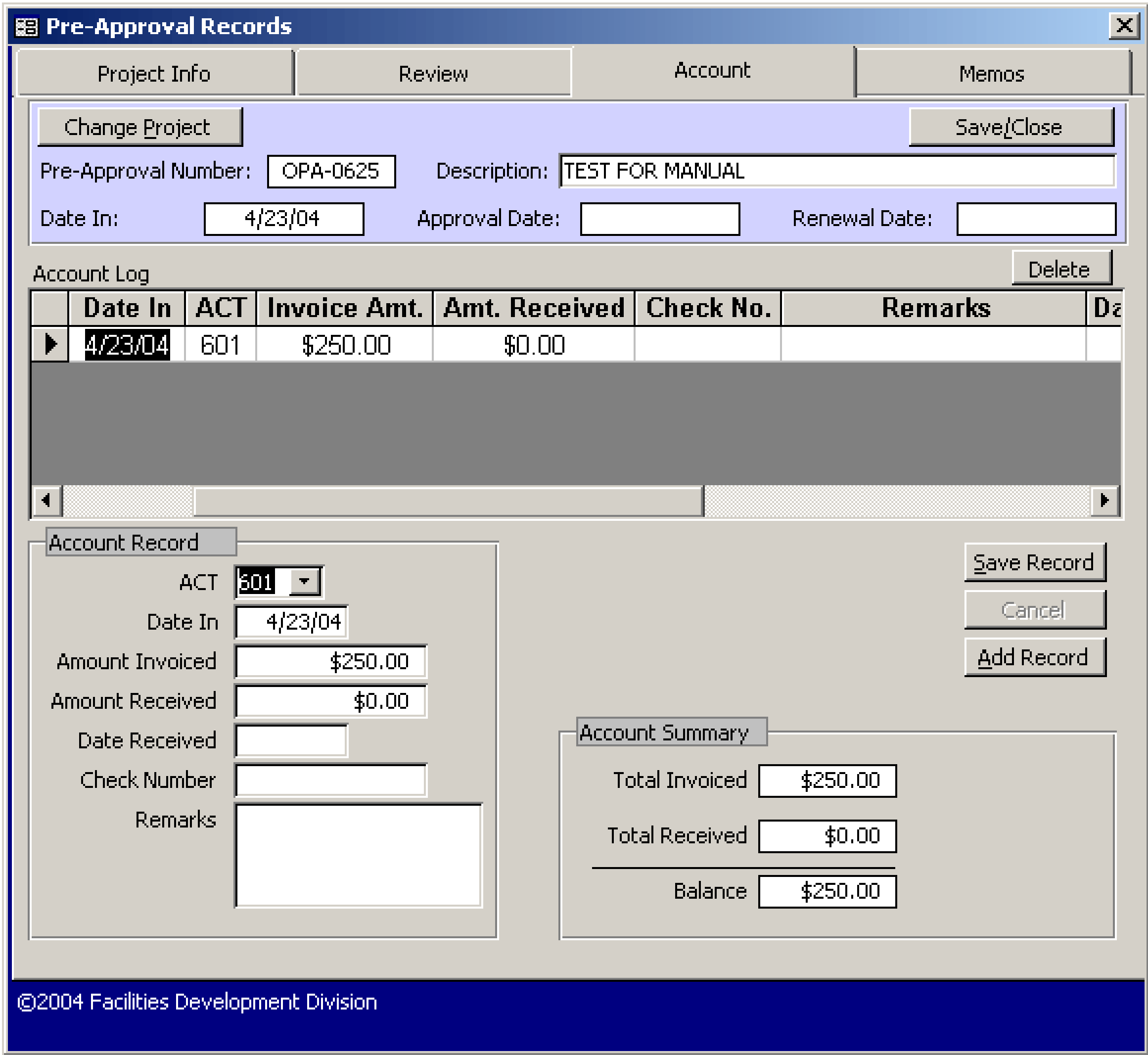
Printing a Letter

The following table displays the different types of letters that are available and the combination of activity code and manager ltr type that are needed to generate each letter.

ActCode	RvwType	RvwResult	LetterName
325	N	AP	Approval
325	N	AC	Approval
325	N	DT	Defect
331	N	AP	Approval
331	N	AC	Approval
331	N	DT	Defect
341	N	AP	Approval
341	N	AC	Approval
341	N	DT	Defect
325	R	AP	Approval
325	R	AC	Approval
325	R	DT	Defect
331	R	AP	Approval
331	R	AC	Approval
331	R	DT	Defect
341	R	AP	Approval
341	R	AC	Approval
341	R	DT	Defect
331	N		30DayEstimate
331	R		30DayEstimate
325	N		Acknowledgement
325	R		Acknowledgement

To generate a letter, simply ensure your review matches one of the patterns above, save the review, then click the letter button. All letters are generated in Microsoft® Word so you can edit their content and save a copy for your files.

Account tab



The Account tab is an area to use to record the accounting activities associated with a pre-approval project. Each record has an area to record the amount invoiced and the amount received for that invoice.

Field Descriptions and Features

Account Log section: This area is a read-only table view of all of the account records associated with the project.

Delete button: Deletes the selected account record.

ACT: The activity code for the account record.

Date In: The date the account log entry was made

Amount Invoiced: Amount the submitter was billed.

Amount Received: Amount the submitter has paid towards the invoice amount.

Date Received: Date the amount received was received.

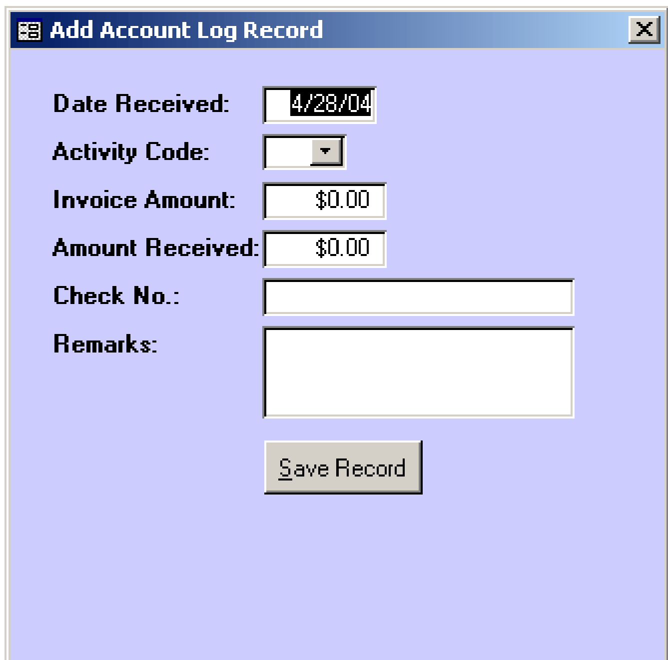
Check Number: If you received a check, enter a check number.

Remarks: Any remarks you may have about the particular account log entry.

Account Summary group: This group contains read-only fields that sum the amount invoiced and amount received information from all account log entries.

Adding an Account Record

To add an Account record, click the Add Record button on the Account tab of the pre-approval form. The add form will open as shown below:



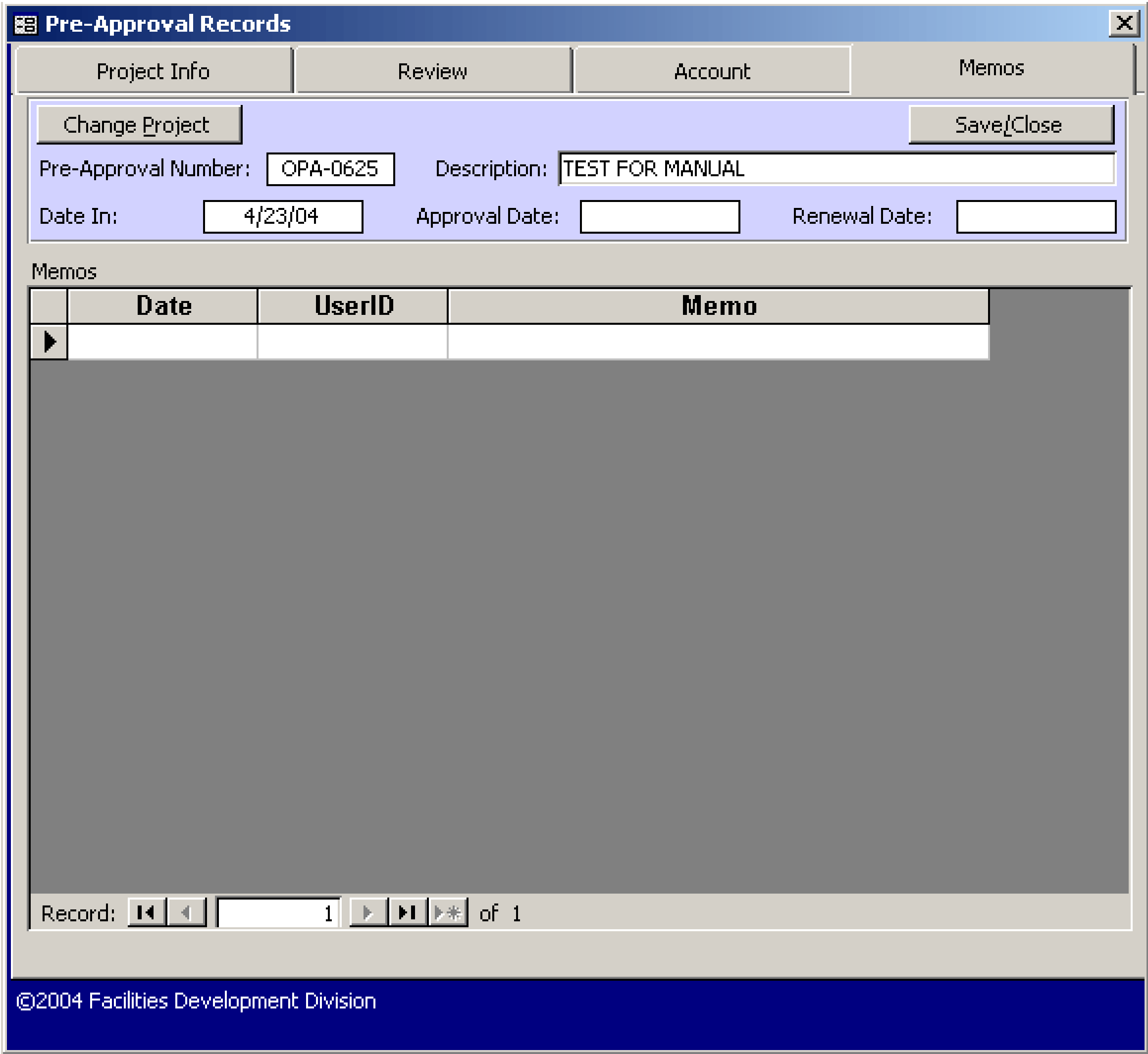
To add a record, you will need to select an activity code and complete either the Invoice or the Received amount. When you select either a 601 or 602 Activity code, the Invoice amount is completed for you and cannot be changed. When you have finished adding information, click the Save Record button. The program will return you to the Account tab with the record you just added selected.

Editing and Account Record

To edit an account record's details, begin by selecting the record on the Account tab of the pre-approval form in the Account Log section.

You can now change any information you would like. Once you have finished making your changes, click the Save button.

Memos tab



The Memos tab is used to store any information about the project you would like that either won't fit in any other remark field, or that simply doesn't belong anywhere else.

Field Descriptions and Features

Date: Read-only field that stores the date the memo was originally created.

UserID: Read-only field that stores the network ID for the person that was logged on to the computer at the time the entry was made.

Memo: This field stores the actual text of the memo. This field has no limit on size.

Adding a Memo

To add a memo, simply click in the bottom empty row of the Memos in the memo field and enter your memo. The Date and User ID will fill automatically and cannot be changed. As soon as you click away from the record, the record is saved.

Editing a Memo

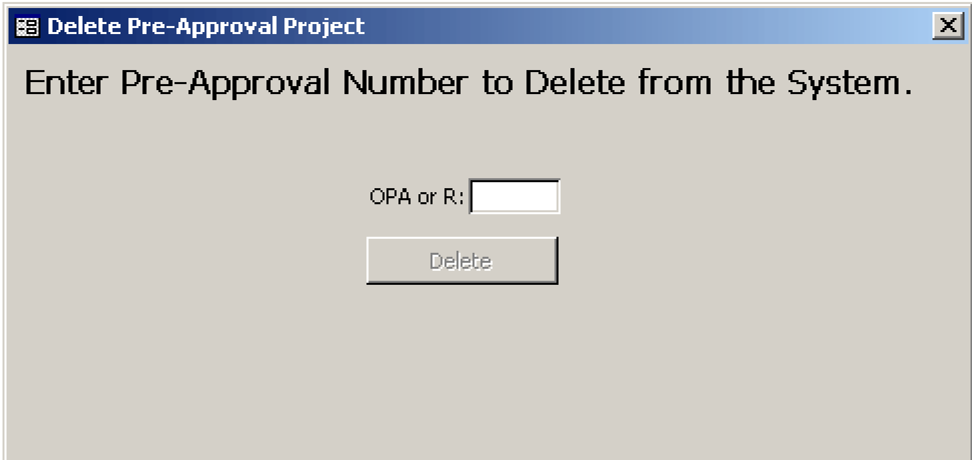
To edit a memo, click in the Memo field of the memo you would like to edit and edit away. As soon as you click off the record, your changes are saved.

Deleting a Memo

You are not allowed to delete a Memo. Please contact the system administrator to have a memo deleted.

Deleting a Pre-Approval Project

To delete a Pre-Approval project, click the Delete half of the Add/Delete button on the main form. The delete pre-approval project form will be loaded as shown below:

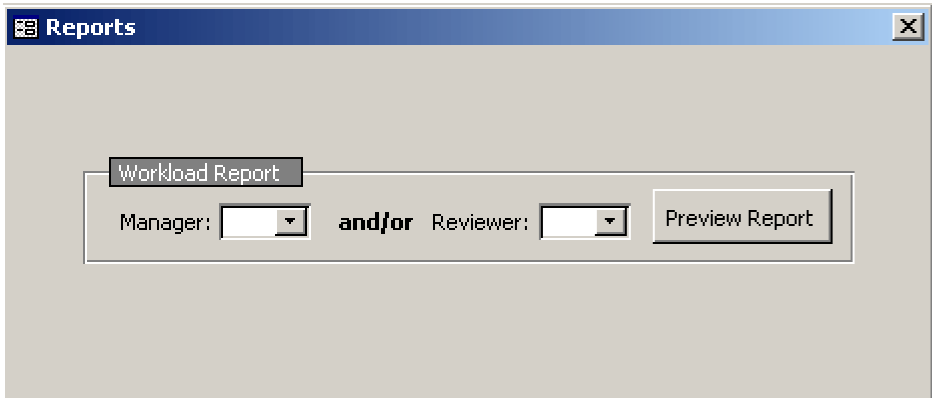


You must enter the numbers ONLY for the pre-approval project you would like to delete. This will delete the project, **ALL REVIEWS** for that project, **ALL ACCOUNT RECORDS** for that project, and **ALL MEMOS** for that project.

Reports

Workload Report

There are two ways to access the workload report. The first way is from the Reports button on the main form. The second way is from the menu bar. Click Reports on the menu bar, then select Workload Report. Either way you choose, the form below will load.



To run the report, fill in manager initials, Review initials, or both, and click Preview Report.

Unfinished Reports

Webpage Reports

Expiration Notices

Notes